



# European travel trends & prospects Q3 2025

October 2025

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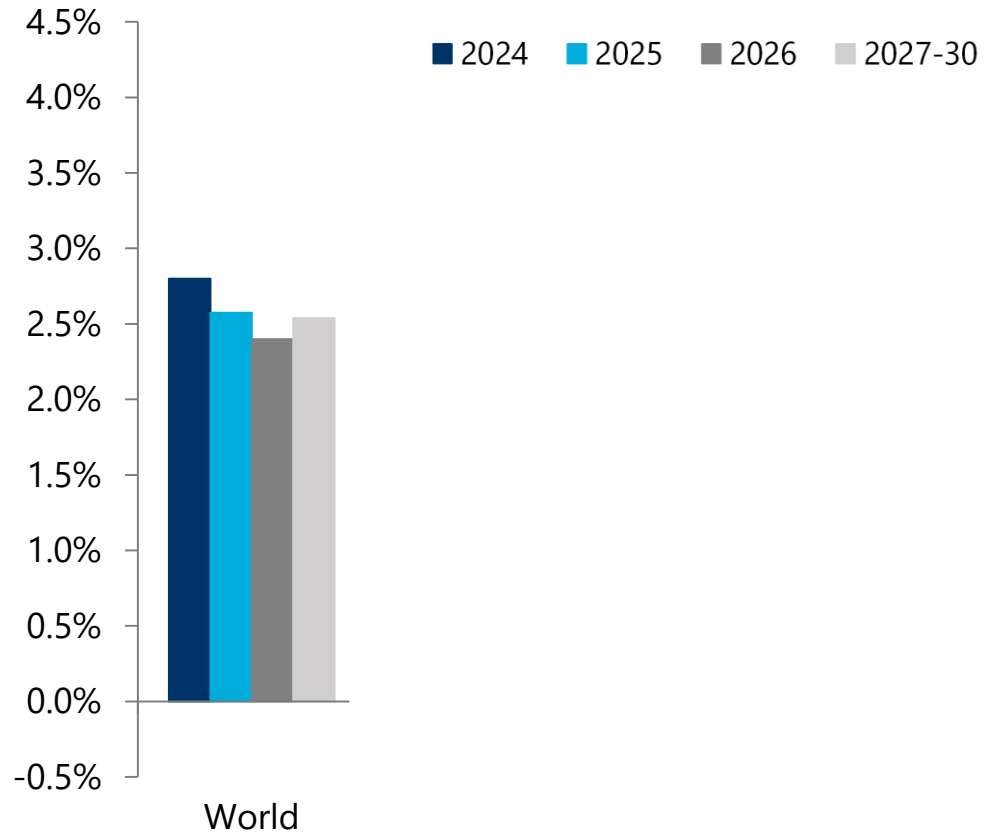
# Overview

- **Tariffs begin to affect economic activity, but travel remains resilient**
- Europe's Destination Reputation: travel trends and outlook year-to-date
- Challenges and opportunities facing the European tourism outlook

# Global GDP growth is temporarily slowing...

## GDP growth in selected economies

% year-on-year change

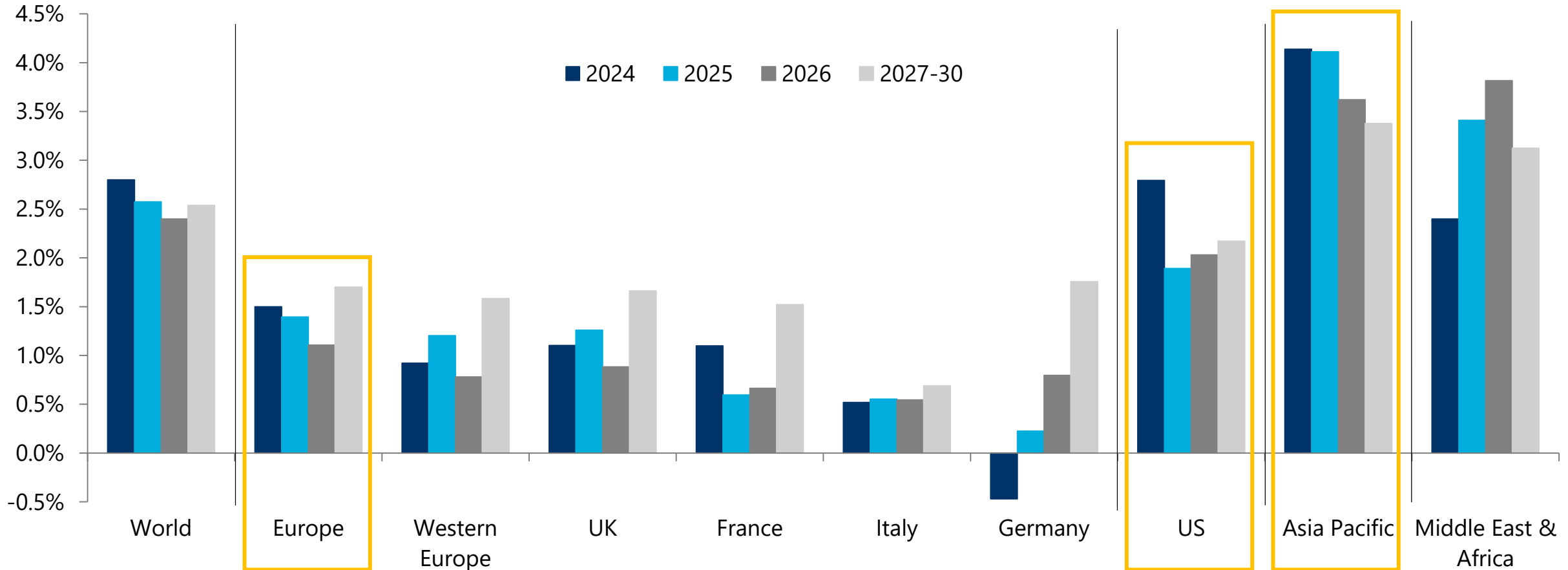


Source: Oxford Economics

# ...and weaker global demand will start to effect activity

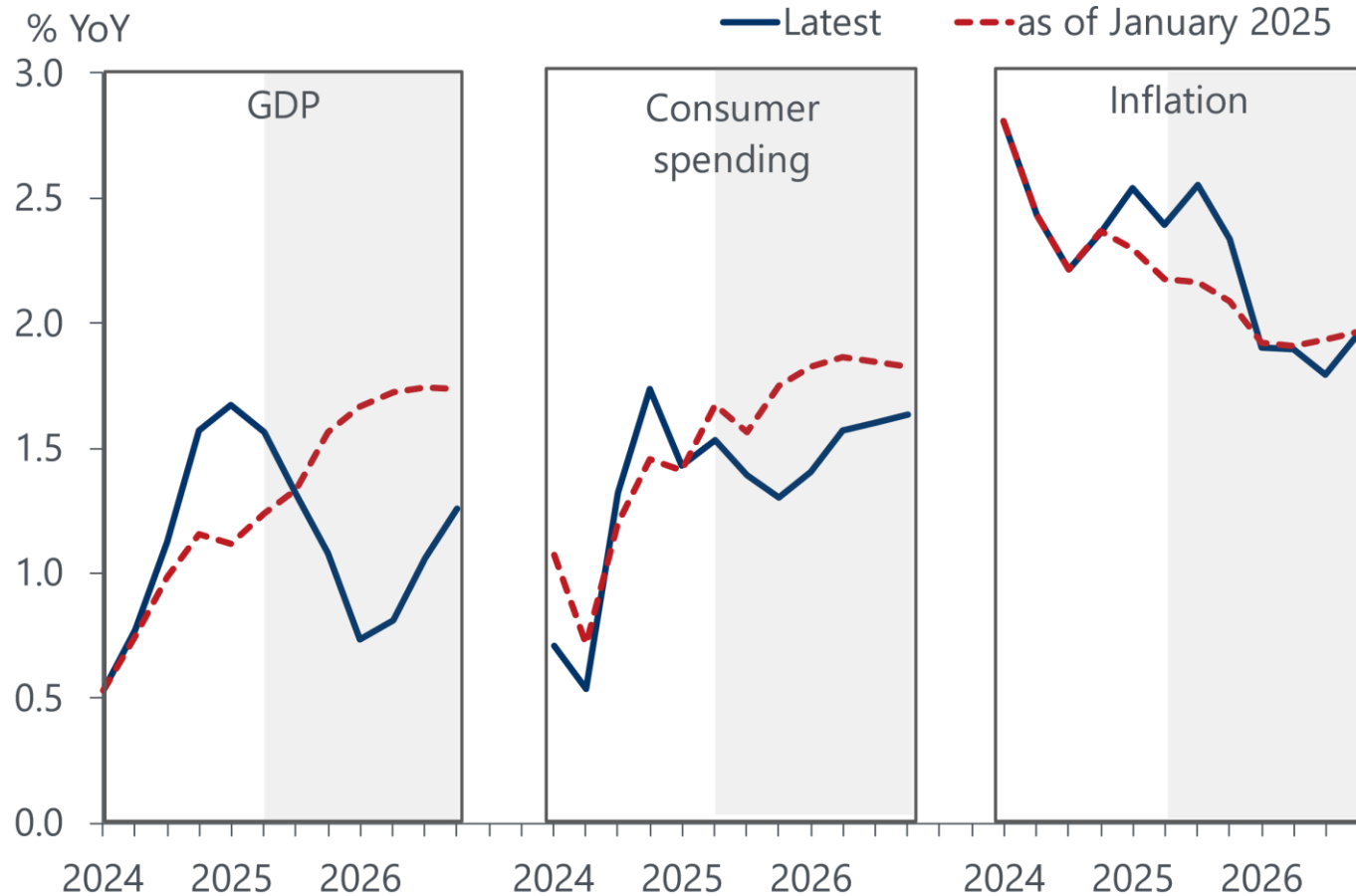
## GDP growth in selected economies

% year-on-year change



# Economic activity in Europe is set to slow in H2 2025

EU plus UK: Forecast revisions since the start of the year



Source: Oxford Economics

European GDP grew faster than anticipated in H1, driven by a **rush to ship orders to the US ahead of tariffs**.

Economic growth is bound to slow down, as front-loading wanes.

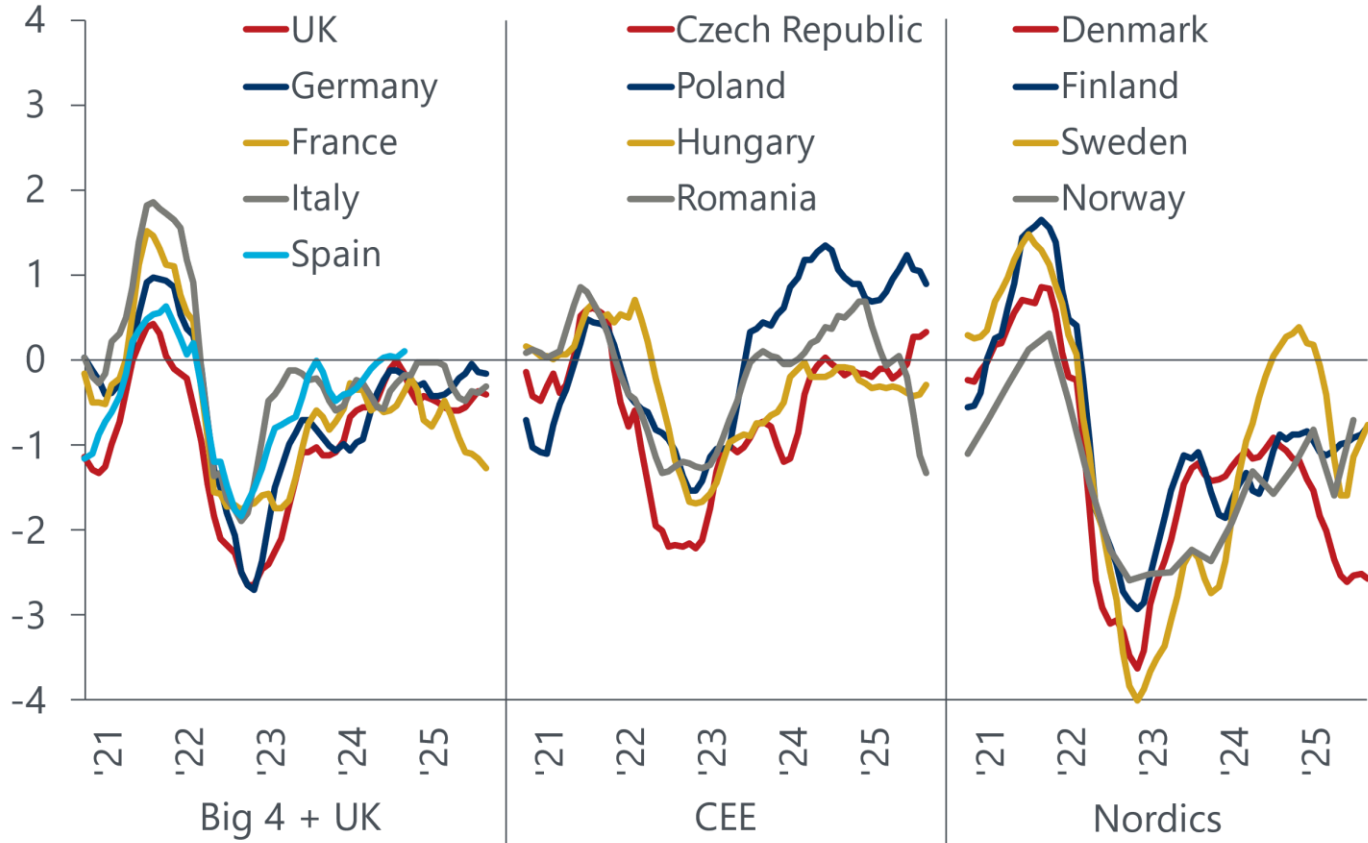
**Consumer spending was more resilient** than we thought in 2024, but **growth is slowing in 2025**.

**Inflation-adjusted consumer spending to accelerate gradually in 2026**, aided by resilient labour markets.

# Confidence remains below historical norms...

## EU & UK: Consumer confidence

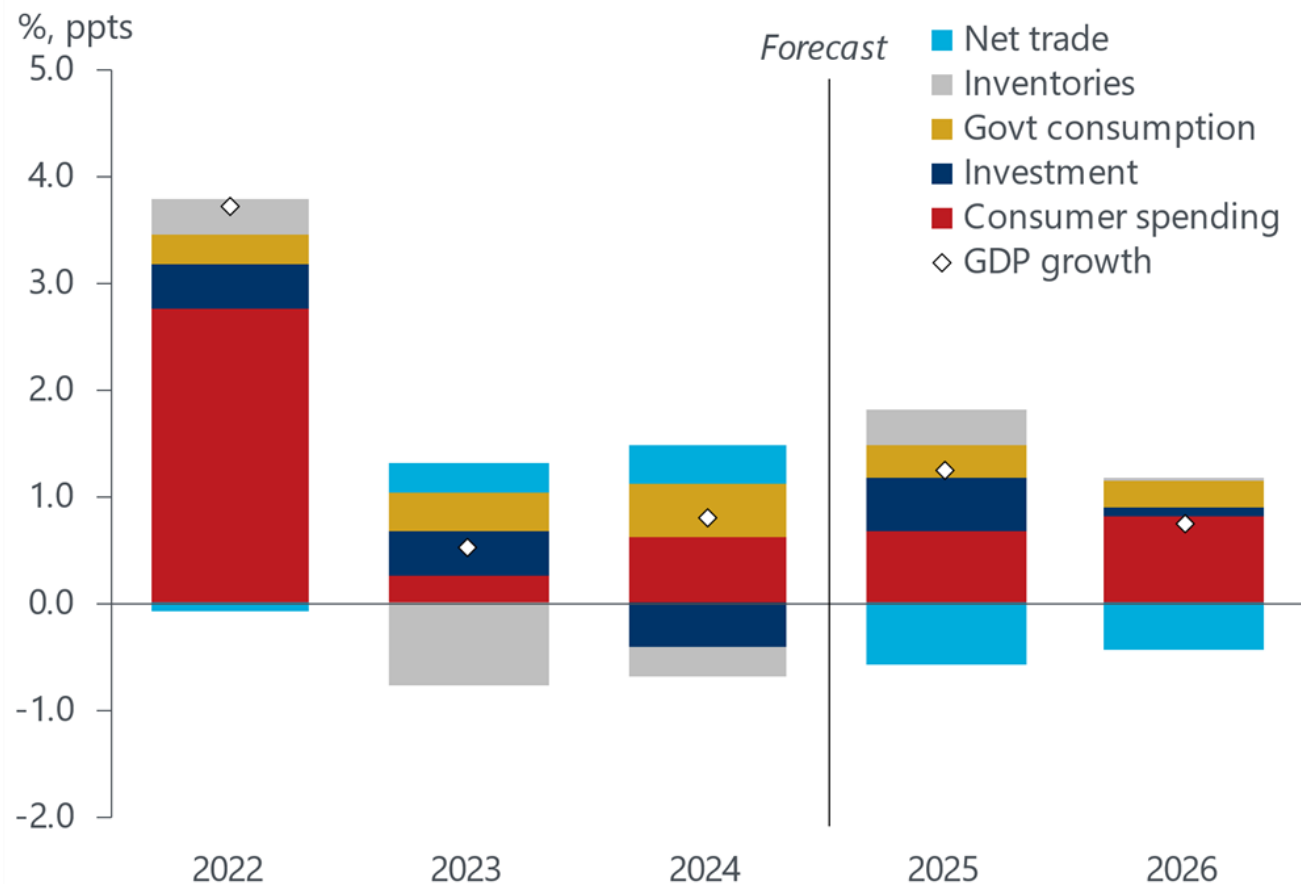
Normalised index, 3-month average



Source: Oxford Economics/Haver Analytics

# ...but consumers will play a key role in growth in the near term

Eurozone: Contributions to GDP growth



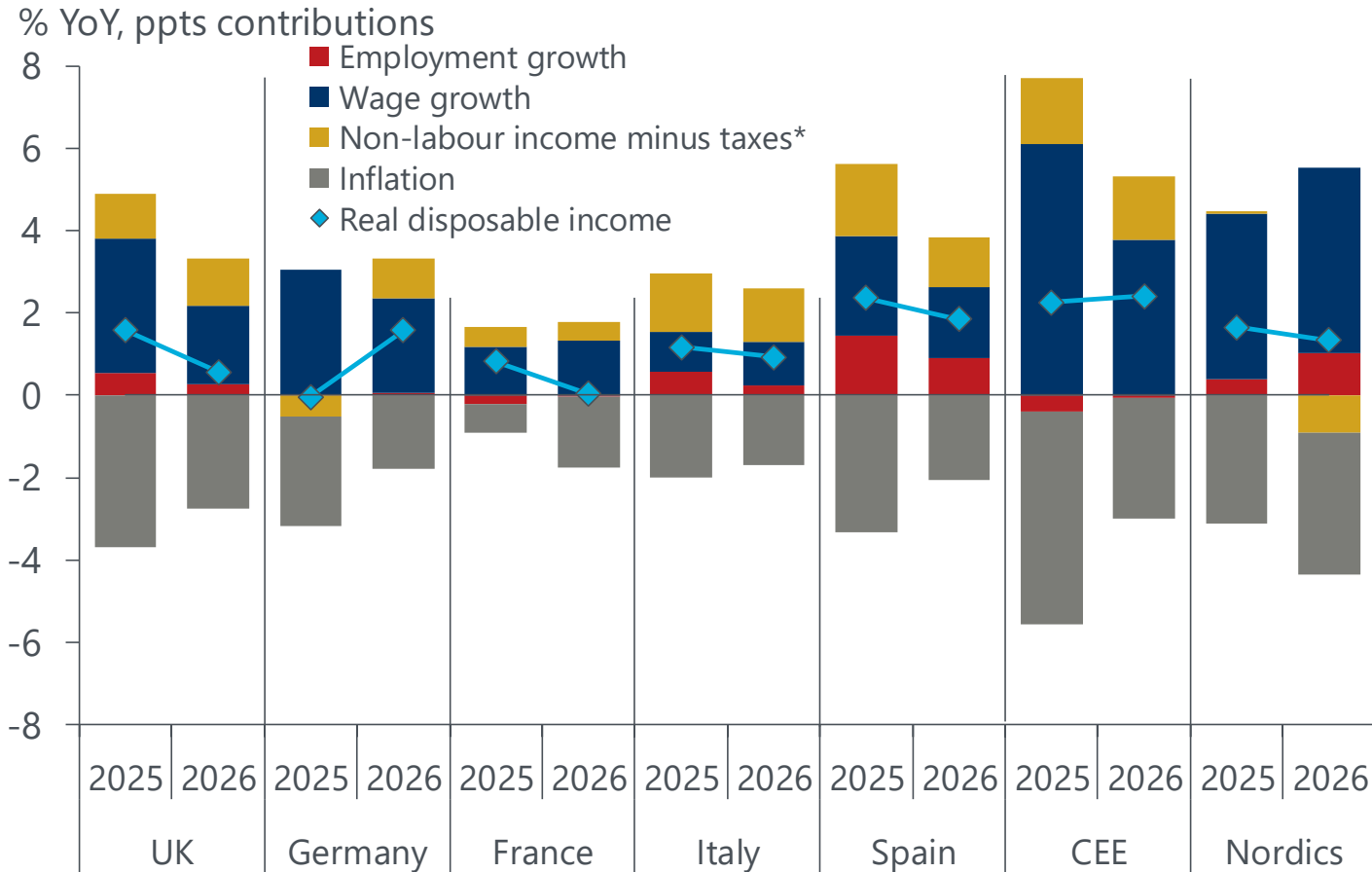
Source: Oxford Economics

Lower interest rates and falling inflation resulting in real income gains

Households still expected to save a good portion of income, but lower saving rate will support a rise in consumption, but most excess savings will not be drawn down

# Variations in inflation will impact disposable income

## EU & UK: Real disposable household income growth



Source: Oxford Economics

\*Social transfers, dividends, net interest receipts, pensions

**Inflation remains elevated in the CEE and the UK.**

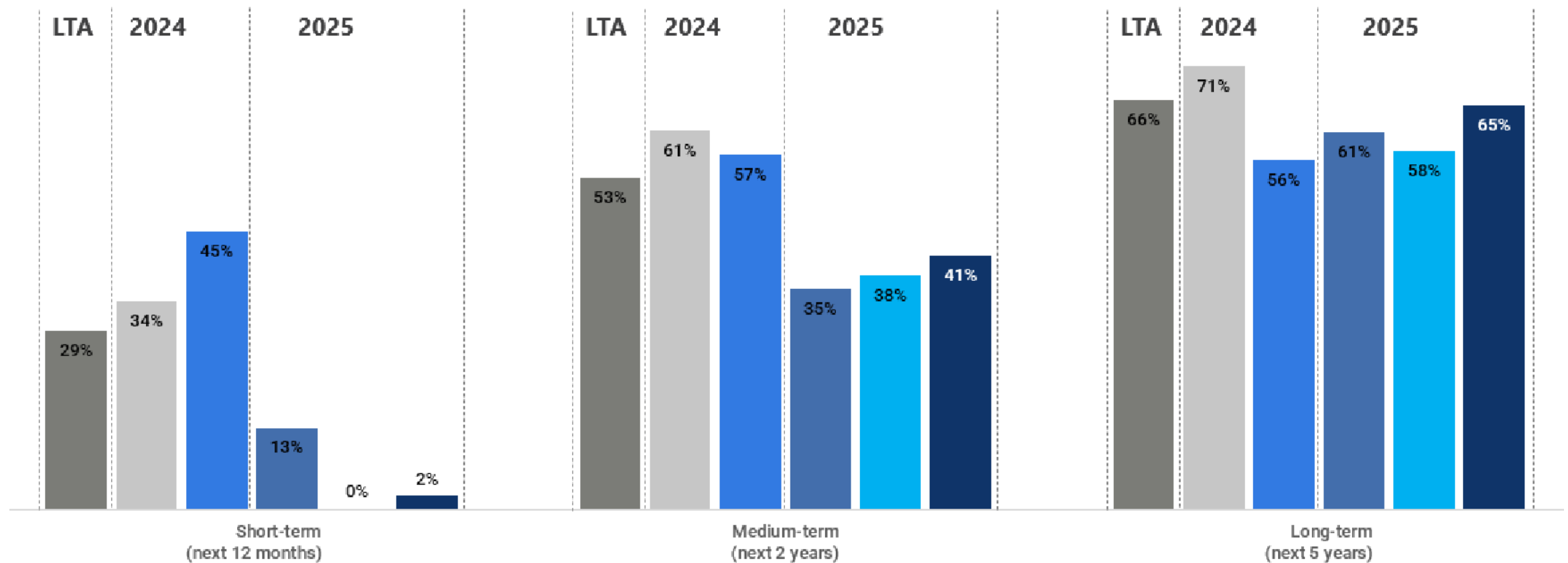
**Both CEE and the UK are likely to see stronger near-term inflation** given wage dynamics and stronger domestic demand.

Firms' selling price expectations remain **higher in the services sector.**

# Medium- and long-term confidence continues to improve

## Tourism Growth Confidence (Net Result)

■ Long-term average ■ Q3 2024 ■ Q4 2024 ■ Q1 2025 ■ Q2 2025 ■ Q3 2025

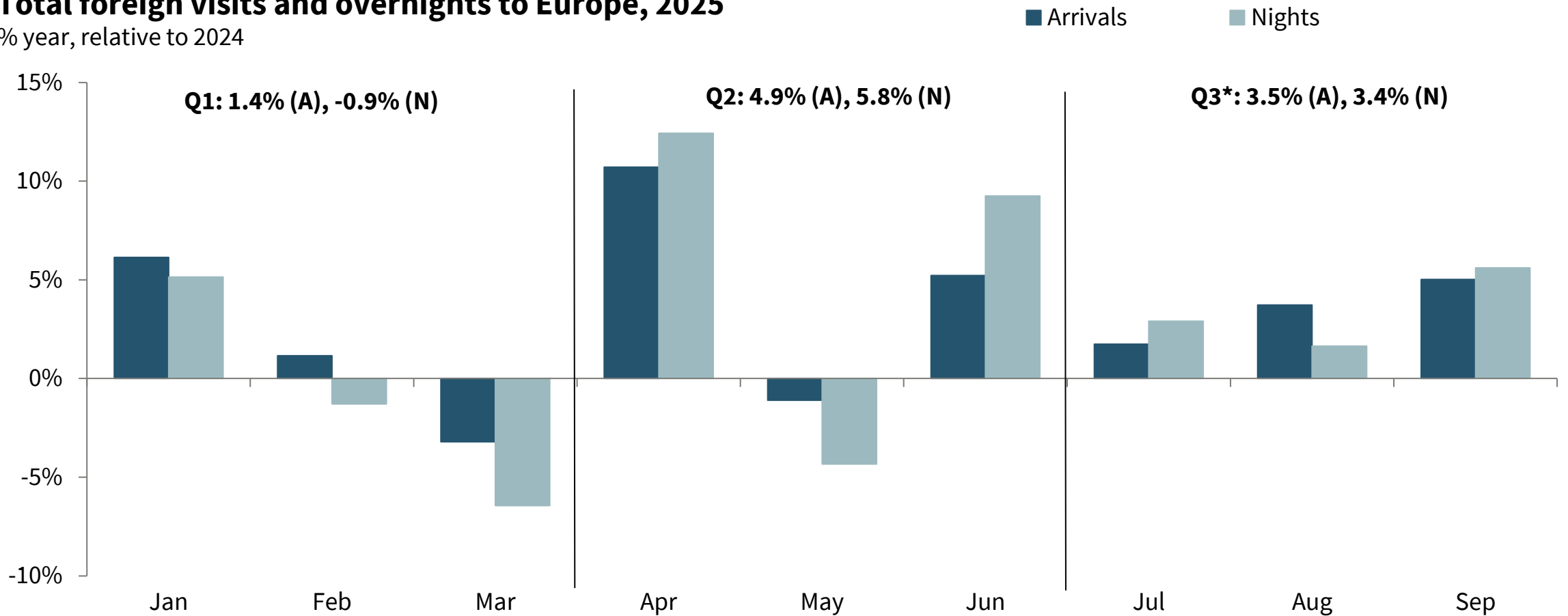


Source: Tourism Economics' Travel Industry Monitor Survey

# European travel activity has picked up through Q3..

## Total foreign visits and overnights to Europe, 2025

% year, relative to 2024

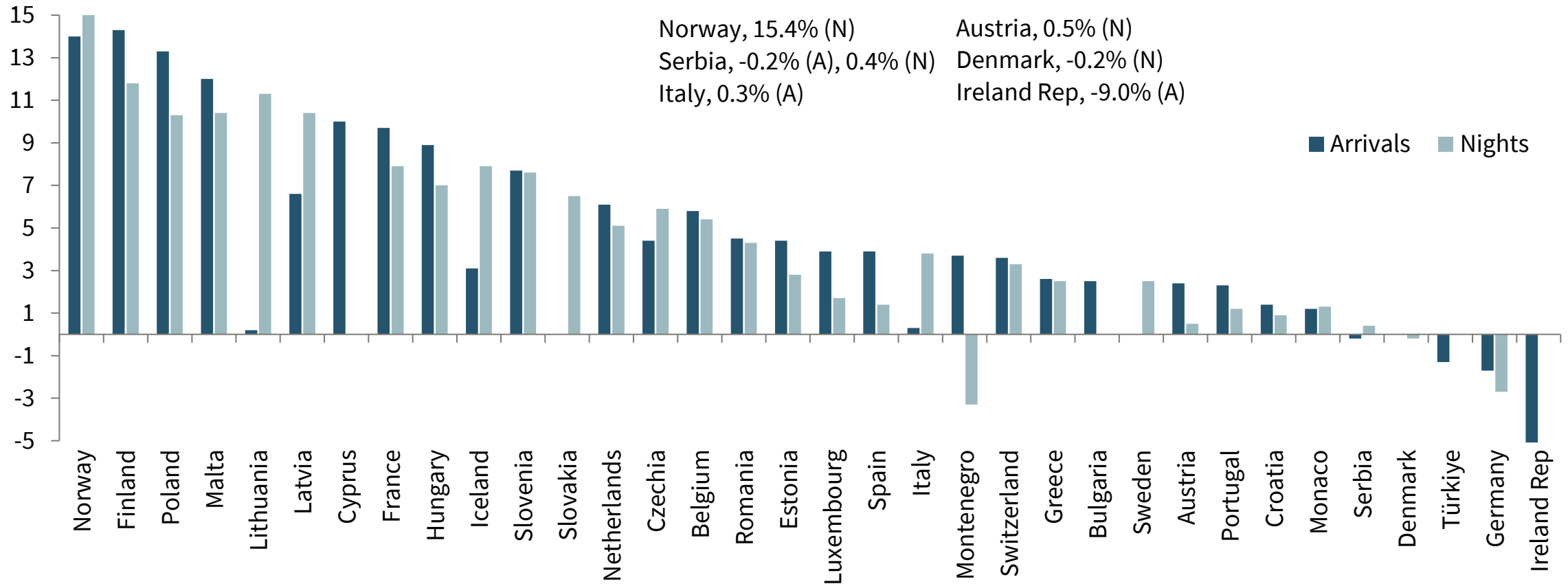


Source: TourMIS\* \*date varies (Jan-Sep) by destination

# ...and most destinations are tracking ahead of 2024

## Foreign visits and overnights to select European destinations

2025 year-to-date\*, % year

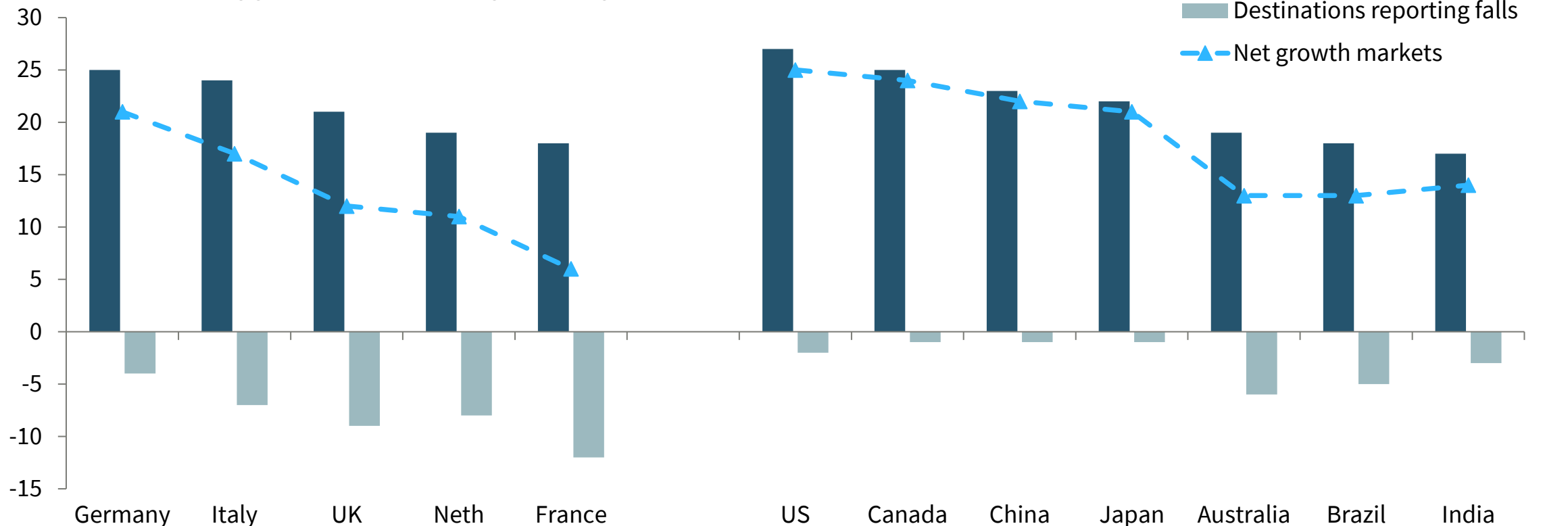


Source: TourMIS\* \*date varies (Jan-Sep) by destination

# Majority of destinations reporting stronger travel demand from North America

## European source market summary, 2025 year-to-date

Destinations reporting growth in arrivals or nights by origin in year-on-year terms



Source: TourMIS (date varies Jan-Sep by destination), Tourism Economics



# Europe's Destination Reputation

TRAVEL TRENDS & OUTLOOK YEAR-TO-DATE

Thursday, 16<sup>th</sup> of October 2025

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## Social Reputation

ONLINE SENTIMENT ON EUROPEAN TRAVEL OVER THE PAST YEAR

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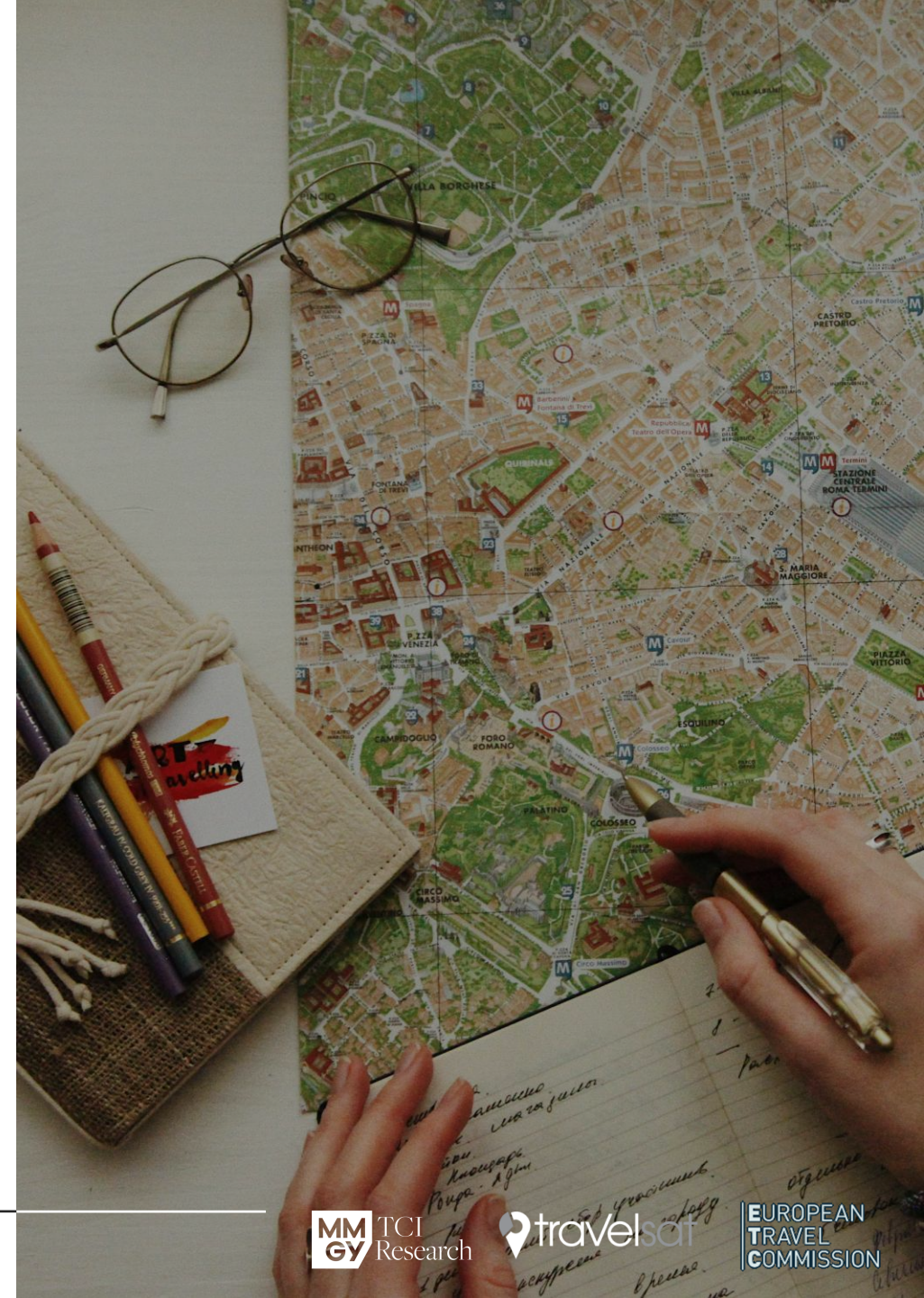
## Experience Reputation

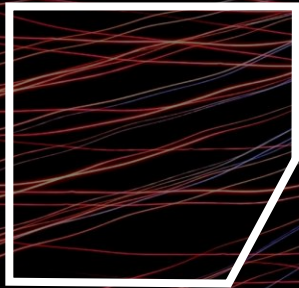
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TAKE-AWAYS ON EUROPE'S DESTINATION REPUTATION





# TRAVELSAT<sup>®</sup> Pulse Methodology

AN OVERVIEW OF DATA FROM TRAVELSAT<sup>®</sup> PULSE

# Destination Reputation – a Holistic Approach

CONSIDERING ALL FACTORS INFLUENCING DESTINATION APPEAL

Experience Reputation



Among the key metrics that DMOs should monitor closely, the **general sentiment** expressed in social media discussions and reviews is crucial to track, as it **significantly influences the trust in potential destinations for travel planners**.

## Destination Context – Social Data

**External**, non-tourism related factors. While DMOs have little control over them, they **continue to affect a destination’s reputation**.

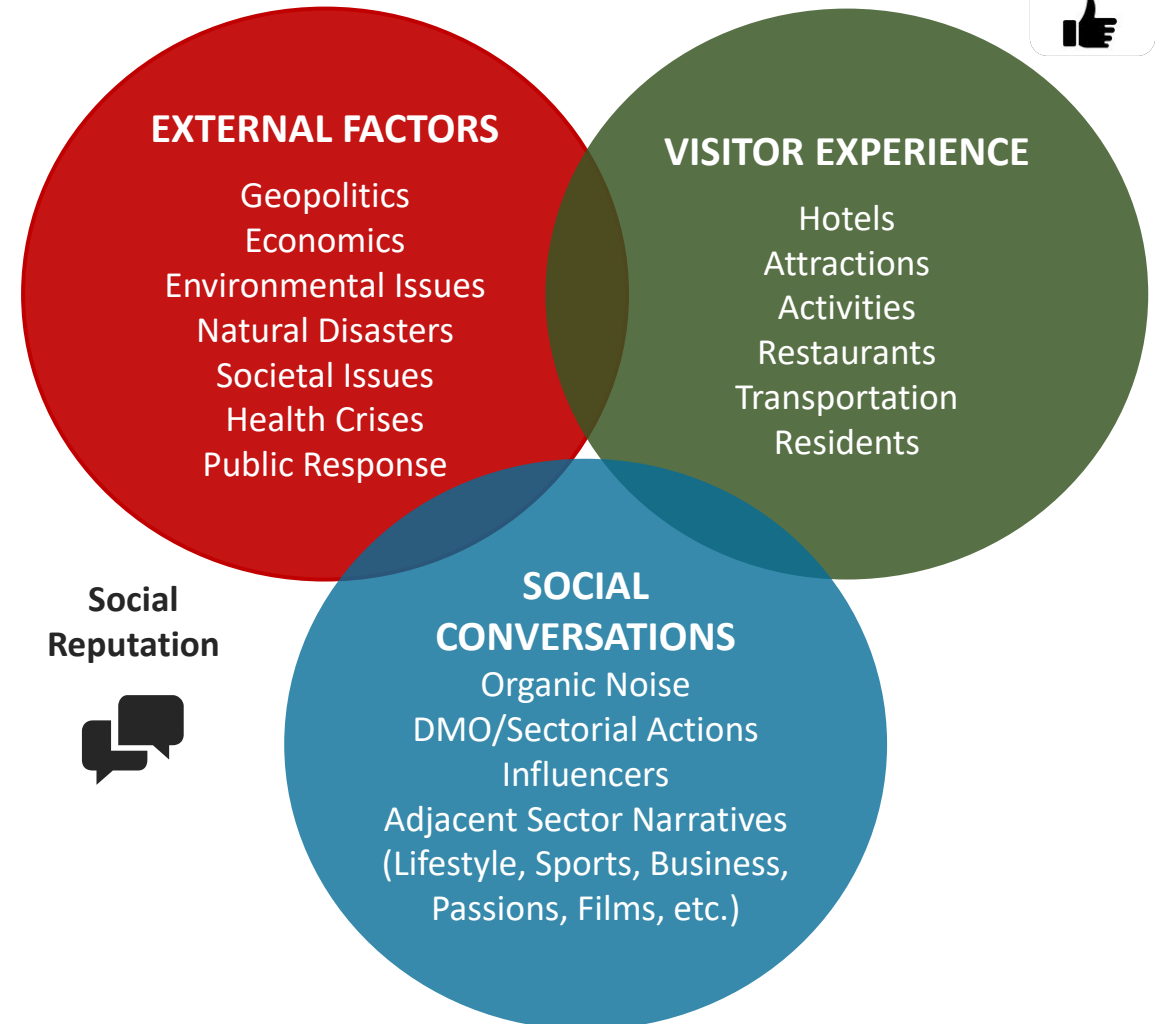
## Destination Stories – Social Data

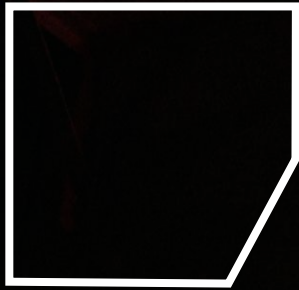
**Tourism** and **adjacent sectors’** social content: influencers, films and series, articles, social media posts, campaigns, sport, business, etc.

With DMOs having a slight degree of control over them, **narratives can serve as drivers** (or detractors) when considering destinations.

## Destination Experience – Reviews Data

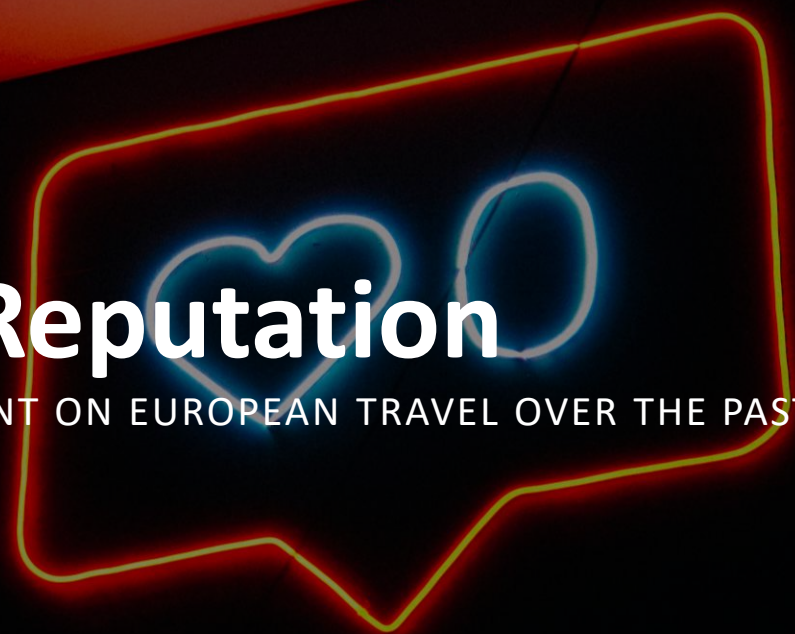
**Reputation of tourism experiences** DMOs have a higher level of control over.





# Social Reputation

ONLINE SENTIMENT ON EUROPEAN TRAVEL OVER THE PAST YEAR

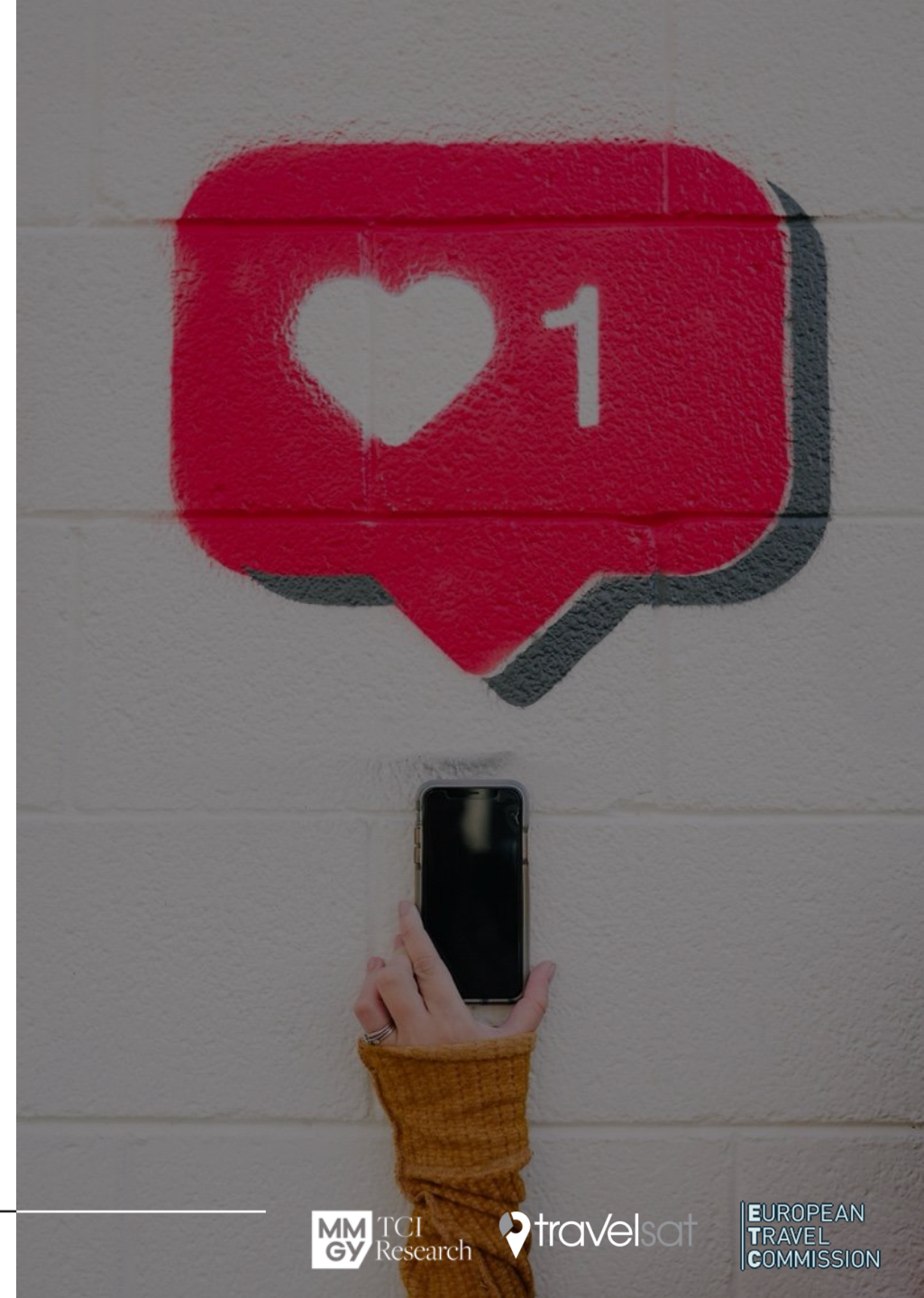
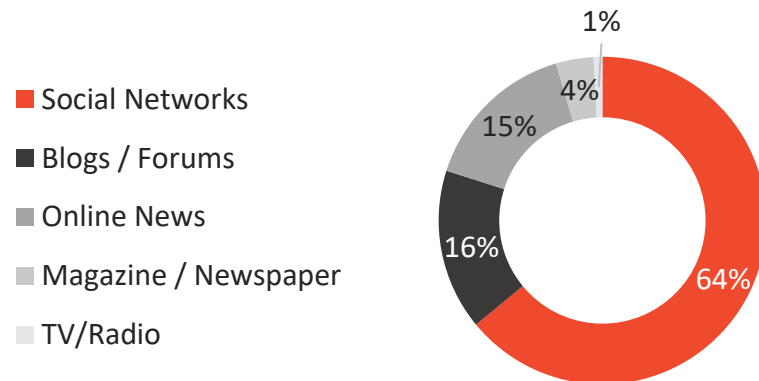


# Sentiment Tracker

DESTINATION REPUTATION AT LARGE

## Analysing online social data

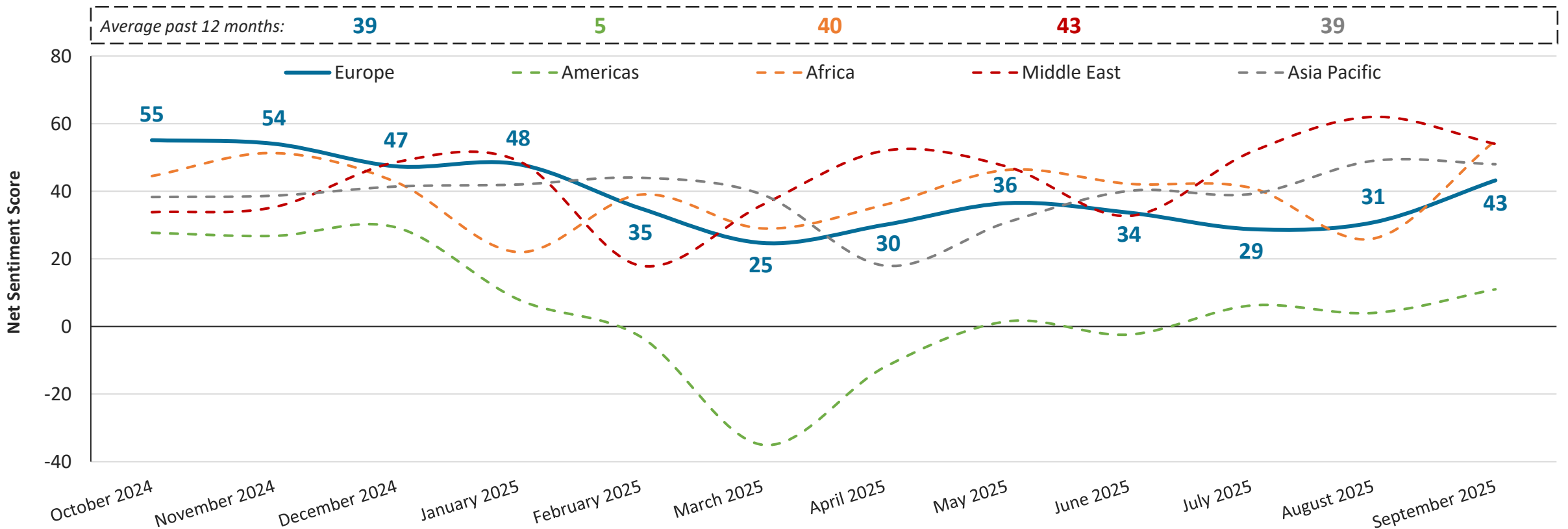
- The “**sentiment**” reflects the **state of travel brands’ online reputation**. These are seen through **online social conversations at a global level**.
- They are shared by differing **media, consumers, companies, citizens, brands and officials on websites, forums, blogs & social networks**.
- While sentiment is not predictive of travellers' planning, a **positive e-reputation is essential to generate favourability towards destinations** and travel brands, particularly when choosing a destination.
- Between October 1<sup>st</sup>, 2024, to September 30<sup>th</sup>, 2025, **Europe was mentioned 4.9M times in social conversations** in relation to tourism, generating **91.7M engagements**, shared by **990.6K unique authors** from **232 countries**.



# Europe's Social Reputation

ONLINE SENTIMENT ON EUROPEAN TRAVEL OVER THE PAST YEAR

Europe closed 2024 on a strong note, with sentiment scores holding steady and generally **outperforming or matching global competitors**. However, early 2025 marked a shift, as **widespread transport disruptions** caused by **extreme weather** and **strikes** pushed Europe down from the top spot. Sentiment reached its lowest point in March, driven by **growing resident backlash towards tourism in parts of Southern Europe**—a trend that would intensify over the summer months.



**Note:** The TRAVELSAT® Net Sentiment Score measures the polarity of online social conversations from media, blogs, forums and social channels influencing destinations' reputation.

# Travel Reputation Themes

AN OVERVIEW OF THE LAST 12 MONTHS

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## Positive Social Conversations Online

- 1. Festivities and Cultural Events:** One of the most frequent drivers of positive travel conversations, highlighting Europe's strong events-based appeal. Online content highlighted parades, traditional performances, local folklore, festive markets, and major international festivals.
- 2. Nature and Restorative Travel:** Multiple stories from hiking in the Alps, whale watching in the Canary Islands and seasonal landscapes in Tuscany, while wellness travel was widely featured through spas, floating saunas and thermal baths.
- 3. Architecture, Heritage, and Art:** A recurring theme reinforcing Europe's reputation for cultural preservation and visual appeal. Coverage highlighted both iconic landmarks and lesser-known cities for their architectural and artistic value.
- 4. Culinary and Food tourism:** A strong theme across multiple months, often tied to cultural diversity. Online discussions emphasised local ingredients, authenticity, and food as a defining part of a destination's culture.
- 5. Sustainability and Green Mobility:** Frequently featured in positive travel narratives, showcasing eco-friendly destinations and transport initiatives, such as rail network expansions, recycling programmes, integrated public transport, and low-impact adventure options.

## Negative Social Conversations Online

- 1. Safety, Security, and Social Unrest:** Security incidents and social tensions contributed to negative sentiment, marked by attacks, demonstrations, and petty crime in cities. Prominent stories included the attack on Magdeburg's Christmas market, violent clashes in Amsterdam, and more recently the geo-political tensions with Russia.
- 2. Climate and Environmental Disruptions:** Floods, wildfires, and record-breaking heatwaves disrupted travel and raised safety concerns. Online coverage also referenced the closure of major sites such as the Acropolis and highlighted marine pollution incidents in Spain.
- 3. Overtourism and Anti-Tourism Protests:** A persistent negative theme, particularly, but not only, across Southern Europe. Online stories covered large-scale protests and resident concerns over housing shortages, environmental damage, and declining quality of life.
- 4. Transport Disruptions and Strikes:** Stories around transport-related issues occurred regularly, including Ryanair's route reductions, repeated union strikes in major European countries, and major blackouts across Spain and Portugal. These incidents underscored ongoing infrastructure strain.

**Note:** Topics have been sorted from most to least mentioned on each list

**Period of analysis:** October 1<sup>st</sup>, 2024, to September 30<sup>th</sup>, 2025

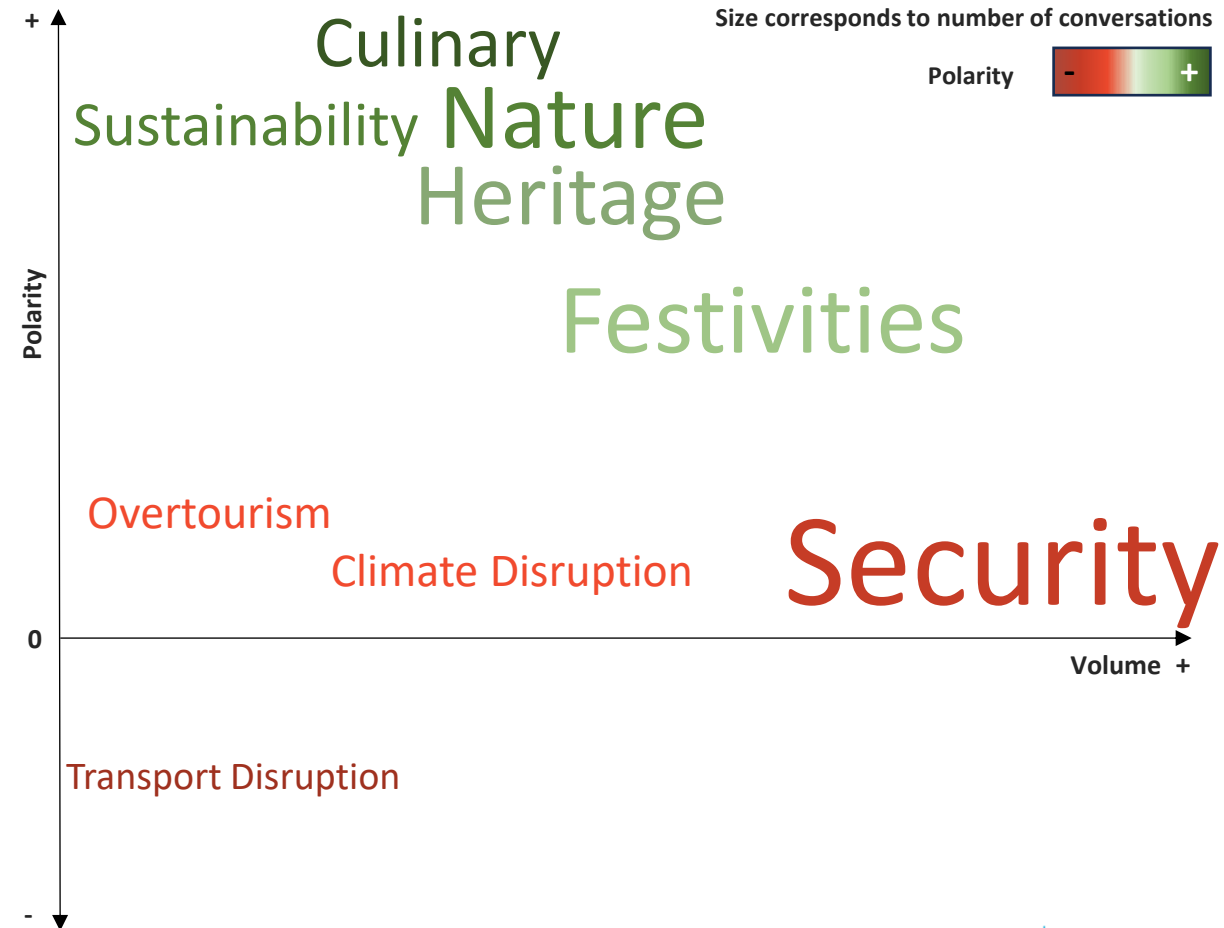
# Travel Reputation: Key Themes Mapped

VOLUME & POLARITY OF KEY THEMES ACTIVATED BY TRAVEL IN EUROPE

**Culinary, restorative and eco-friendly** experiences generated the most positive sentiment, reflecting strong emotional appeal around **authentic, low-impact experiences**. In contrast, **security concerns remained the main driver of negative sentiment** across Europe in terms of conversational volume.

Key Positive Themes		Volume	Polarity
<b>Culinary</b>	Culinary identity and diversity, local ingredients, authenticity	107,492	97
<b>Nature</b>	Nature experiences and (re-) connection to nature, outdoor activities, wellness travel	140,305	94
<b>Sustainability</b>	Eco-friendly destinations, rail expansion, sustainable initiatives, low-impact travel	79,735	93
<b>Heritage</b>	Iconic landmarks, cultural preservation, design appeal, artistic value	136,301	92
<b>Festivities</b>	Parades, traditional performances, local folklore, markets, international festivals	159,545	83

Key Negative Themes		Volume	Polarity
<b>Security</b>	Security Incidents, Safety concerns, Public Safety, attacks, terror incidents, crime	451,480	1
<b>Climate Disruptions</b>	Floods, wildfires, heatwaves, pollution	99,874	8
<b>Overtourism</b>	Anti-tourism protests, resident concerns, overcrowded destinations and sights	29,326	17
<b>Transport Disruptions</b>	Union strikes, infrastructure strain, waiting times, cancellations	25,345	-29



Period of analysis: October 1<sup>st</sup>, 2024, to September 30<sup>th</sup>, 2025



# Experience Reputation

THE VISITOR EXPERIENCE IN EUROPE OVER THE PAST YEAR



# Ratings & Reviews

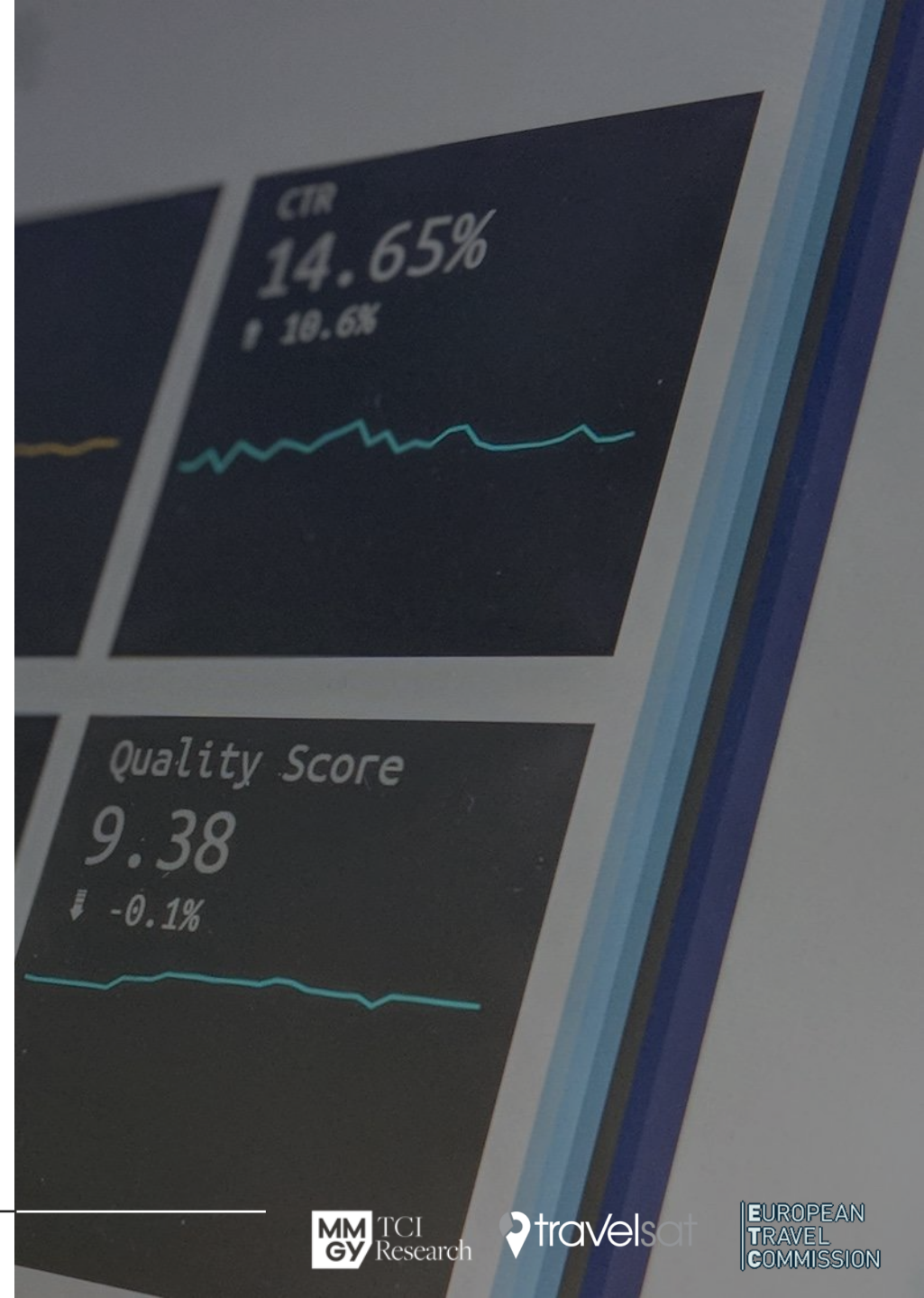
## METHODOLOGICAL OVERVIEW

### Consolidating ratings and reviews

- TRAVELSAT® Pulse uses a solid **aggregation methodology to consolidate reviews**, both **numerical scores** and **written feedback**, from **45 different sources** that cater to different aspects of the tourism ecosystem.
- The platform presents all scores through a **consolidated scale of 0-10**. These have been **converted from their original source** and are **weighted to adjust the significance** that each source score has. Analyses are carried out across verticals, markets and guest profiles.

### Sentiment analysis technology

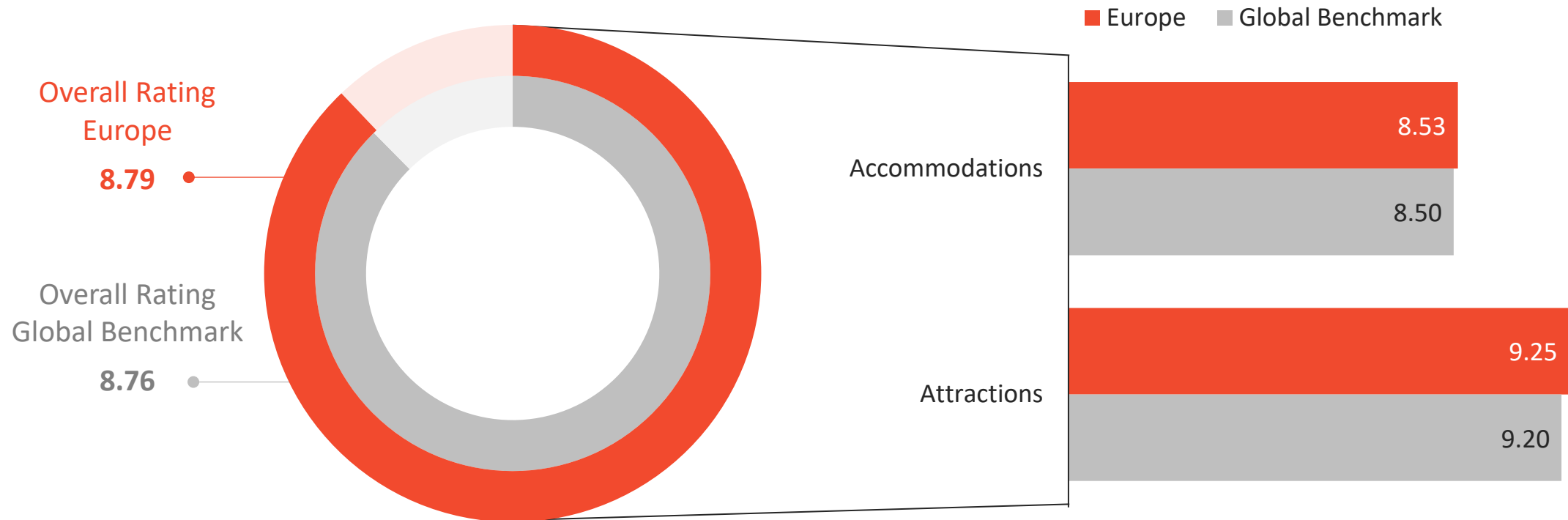
- Beyond structured ratings, **written reviews are also analysed using the most developed sentiment lexicon**. This allows for an analysis of **positive and negative deflections of keywords** on pre-defined topics.
- The AI semantic engine **covers 16 languages**: *Arabic, Russian, Polish, Portuguese, Swedish, Norwegian, Danish, English, French, German, Dutch, Spanish, Italian, Finnish, Turkish, and Simplified Chinese*. However, **ratings and reviews are collected for all sourcing markets** sharing their experience on the rating platforms.



# Overall Experience Reputation

OVERALL SENTIMENT SCORE AND SCORE PER VERTICAL

Europe **stands in line with the global average** in terms of visitor satisfaction, albeit **having a slight advantage**. The same can be said for Europe's accommodations, while its vast offer of **attractions and activities holds a significant advantage above the competition**.

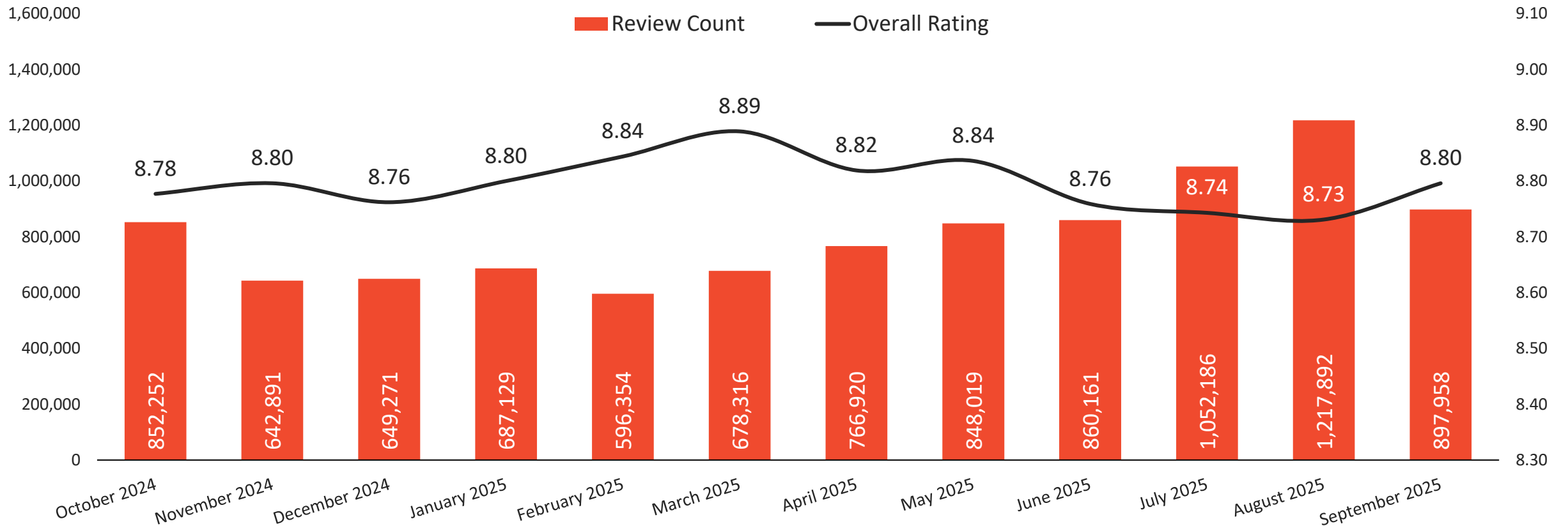


Period of analysis: October 1<sup>st</sup>, 2024, to September 30<sup>th</sup>, 2025

# Score Seasonality

MONTHLY BREAKDOWN OF REVIEW VOLUME & OVERALL RATING

Monthly review volumes suggest a **typical yearly seasonal pattern**, with a **low point at the start of the year** and a **high one in July and August**. Visitor scores further suggest a **higher level of visitation during the summer**, with **scores falling to a lower point** in comparison to other months. Conversely, **March has seen that highest scores in the past 12 months**, with the winter weather subsiding in many key European destinations and **visitor pressure remaining minimal**.



Period of analysis: October 1<sup>st</sup>, 2024, to September 30<sup>th</sup>, 2025

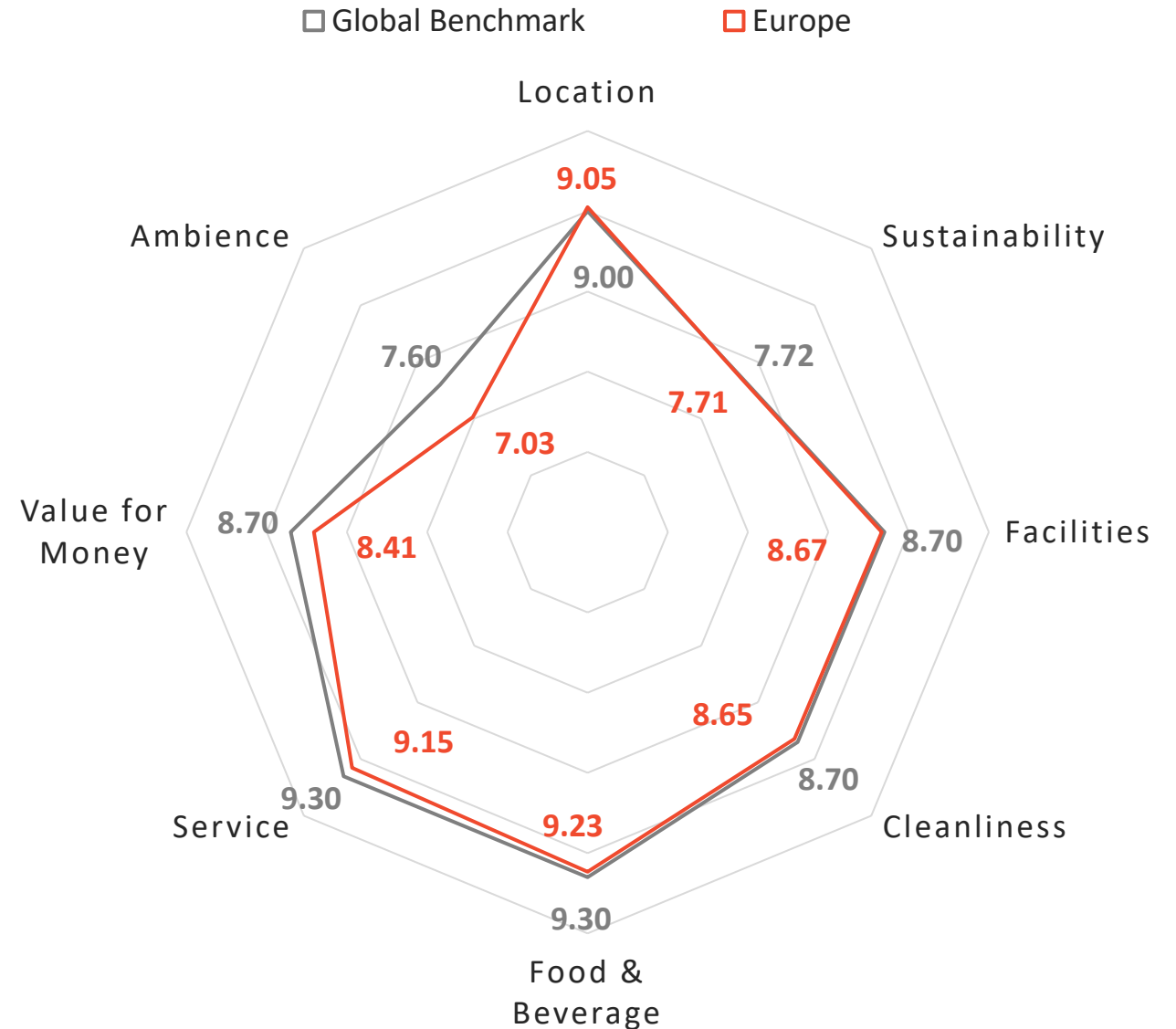
# Sentiment Dimensions

EUROPE'S COMPETITIVENESS AMONGST KEY DIMENSIONS

Mentions of the **location**, perceived **sustainable practices**, **facilities**, and **cleanliness** of European accommodations and attractions in written reviews **all fall in line with their equivalent global averages**.

While still competitive, and **the most positively mentioned topic** in written reviews, **food and beverage falls slightly short of its competitive norm**.

**Mentions of service see a clearer gap**, likely a result of the considerably high level of service seen in other world regions rather than a serious deficit in Europe. **A similar point can be made about value for money**.

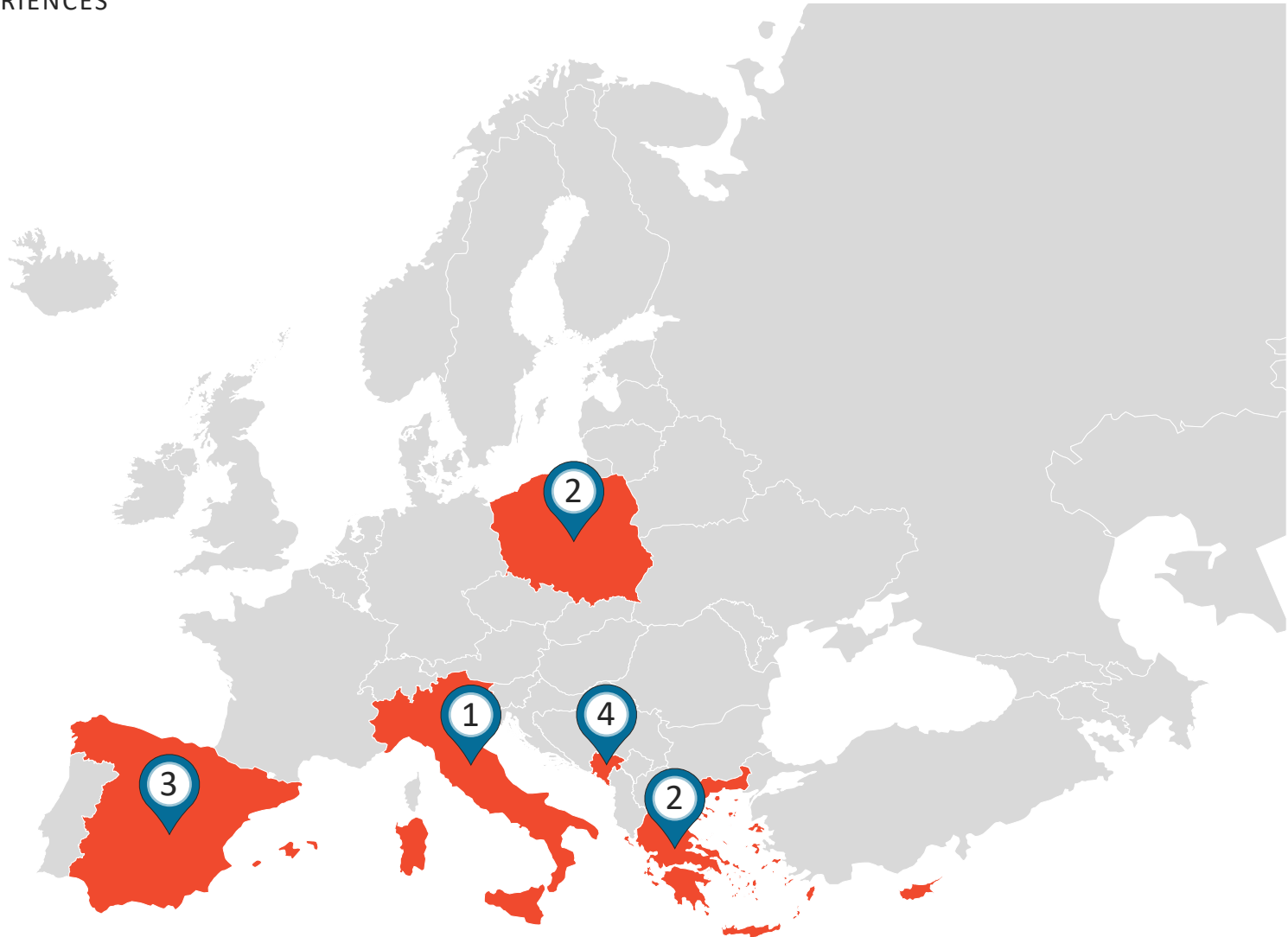
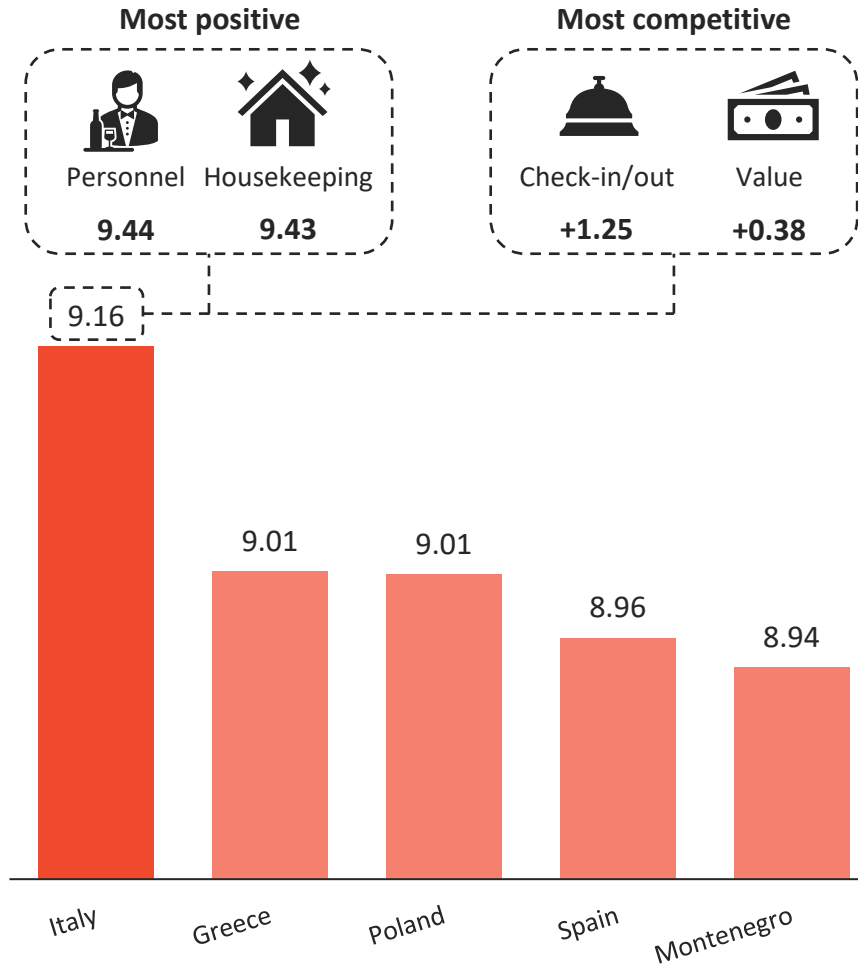


Period of analysis: October 1<sup>st</sup>, 2024, to September 30<sup>th</sup>, 2025

**Note:** Sentiment scores are calculated through an analysis of positive and negative deflections of keywords on pre-defined topics within written reviews. Scores range from 0 to 10, with 10 being the highest level of positive sentiment.

# Scores per European Destination

EUROPEAN DESTINATIONS WITH HIGH OVERALL VISITOR EXPERIENCES



Period of analysis: October 1<sup>st</sup>, 2024, to September 30<sup>th</sup>, 2025



# Conclusion

TAKE-AWAYS ON EUROPE'S DESTINATION REPUTATION



# Conclusion

## TAKE-AWAYS ON EUROPE'S DESTINATION REPUTATION

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### 1. Leveraging Europe's Core Strengths

**Europe's greatest appeal** — both online and through on-the-ground experiences — lies in its **extraordinary breadth of attractions and activities**. To stay competitive, it will be essential to **continue amplifying authentic and unique experiences**:

- **Cultural vitality**: from world-class festivals to local folklore;
- **Heritage and creativity**: architecture, history, and the arts;
- **Culinary diversity**: authentic regional gastronomy that reflects local identity.

### 2. Elevating Service and Value

**Service quality** and **perceived value for money** remain **defining factors in visitor satisfaction**, and areas where **Europe trails slightly behind global benchmarks**. Improving these dimensions requires:

- **Precision in service delivery**: focusing on thoughtful, detail-oriented experiences, especially when cost reductions are challenging;
- **Moments of delight**: offering small, unexpected gestures that leave a lasting impression of care and attentiveness.

### 3. Addressing Structural and Social Challenges

**Resident sentiment toward tourism** and the **resilience of Europe's transport systems** remain pivotal. Continued **investment in community engagement** and **sustainable mobility** can strengthen both local acceptance and Europe's broader reputation as a green destination.



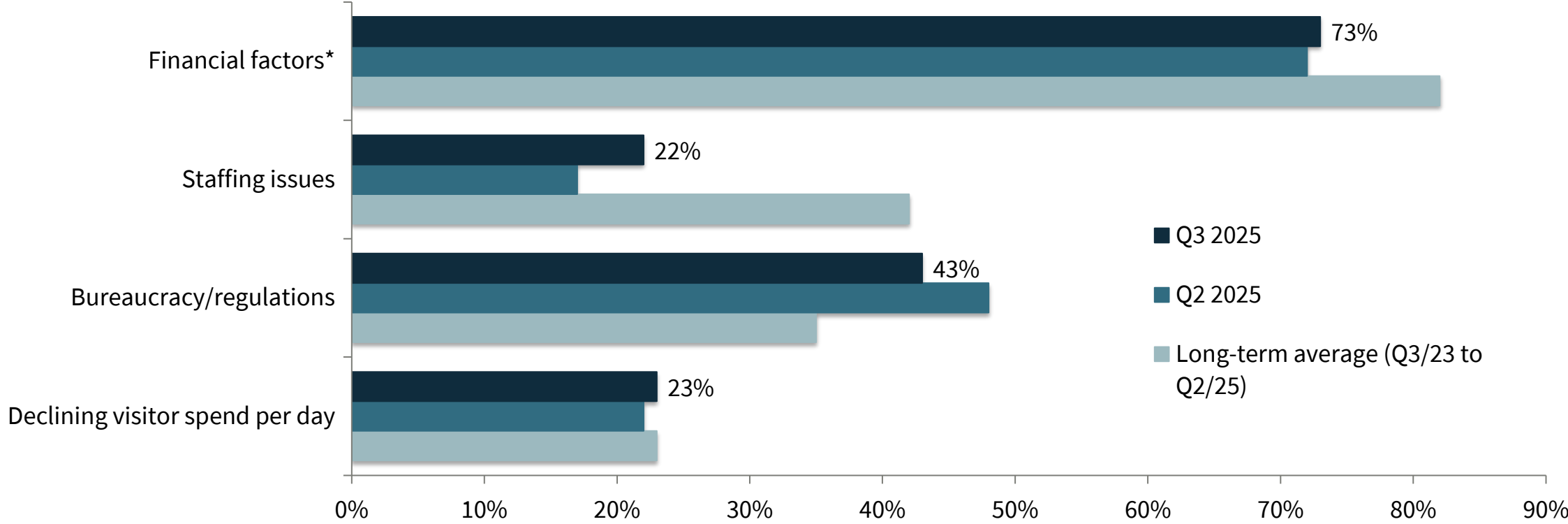
# Overview

- Tariffs begin to affect economic activity, but travel remains resilient
- European Europe's Destination Reputation: travel trends and outlook year-to-date
- Challenges and opportunities facing the European tourism outlook

# Financial factors remain among key challenges for the industry through 2025

## Key Tourism Challenges

% reported as top challenges



Source: Tourism Economics' Travel Industry Monitor

\*Aggregates responses for 'cost of accommodation', 'increasing costs of business' and 'cost of flights'

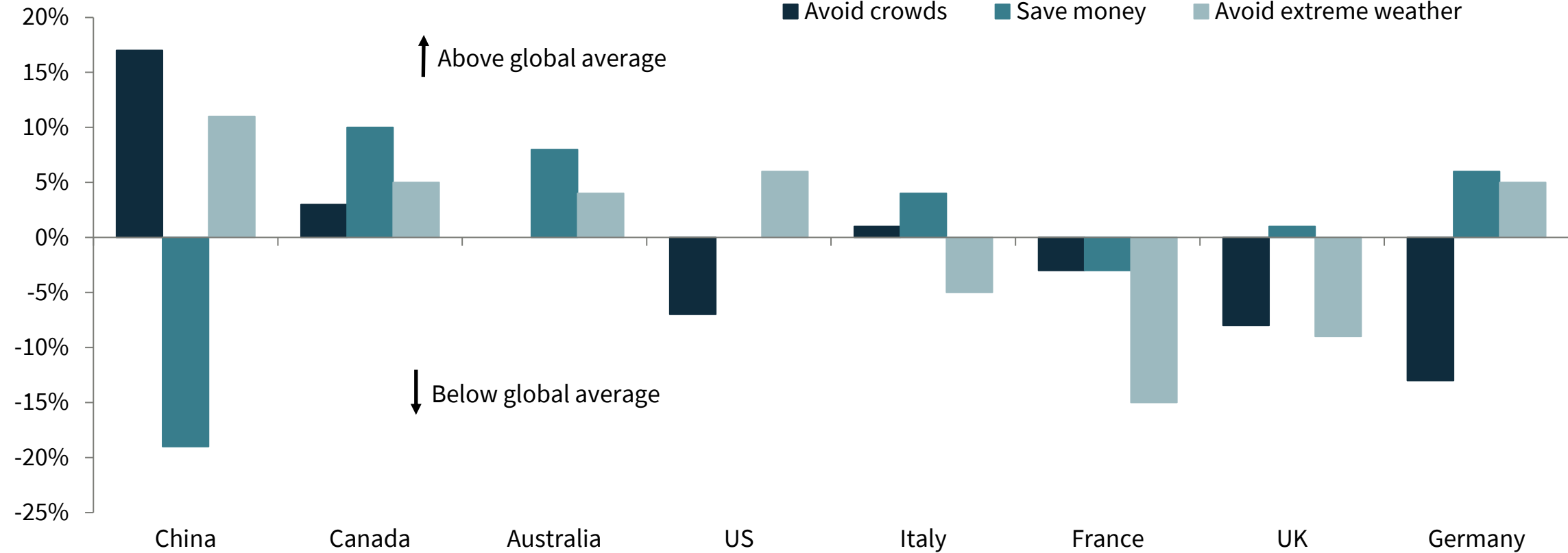


Q: Which, if any, of the following are currently tourism barriers or challenges? (Top five barriers in your country) | LTA = Long-Term Average (Q3 2023-Q2 2025) | Q3 2025: n=137, Q2 2025: n=125, LTA: n=1089  
'Financial Factors' aggregates the following responses: 'Cost of accommodation', 'Increasing costs of business', 'Cost of flights'

# ~30% of those surveyed plan to travel in different months, citing costs, crowds and extreme weather

## Reasons behind deciding to undertake international travel in different months over the next two years

% respondents relative to the global average

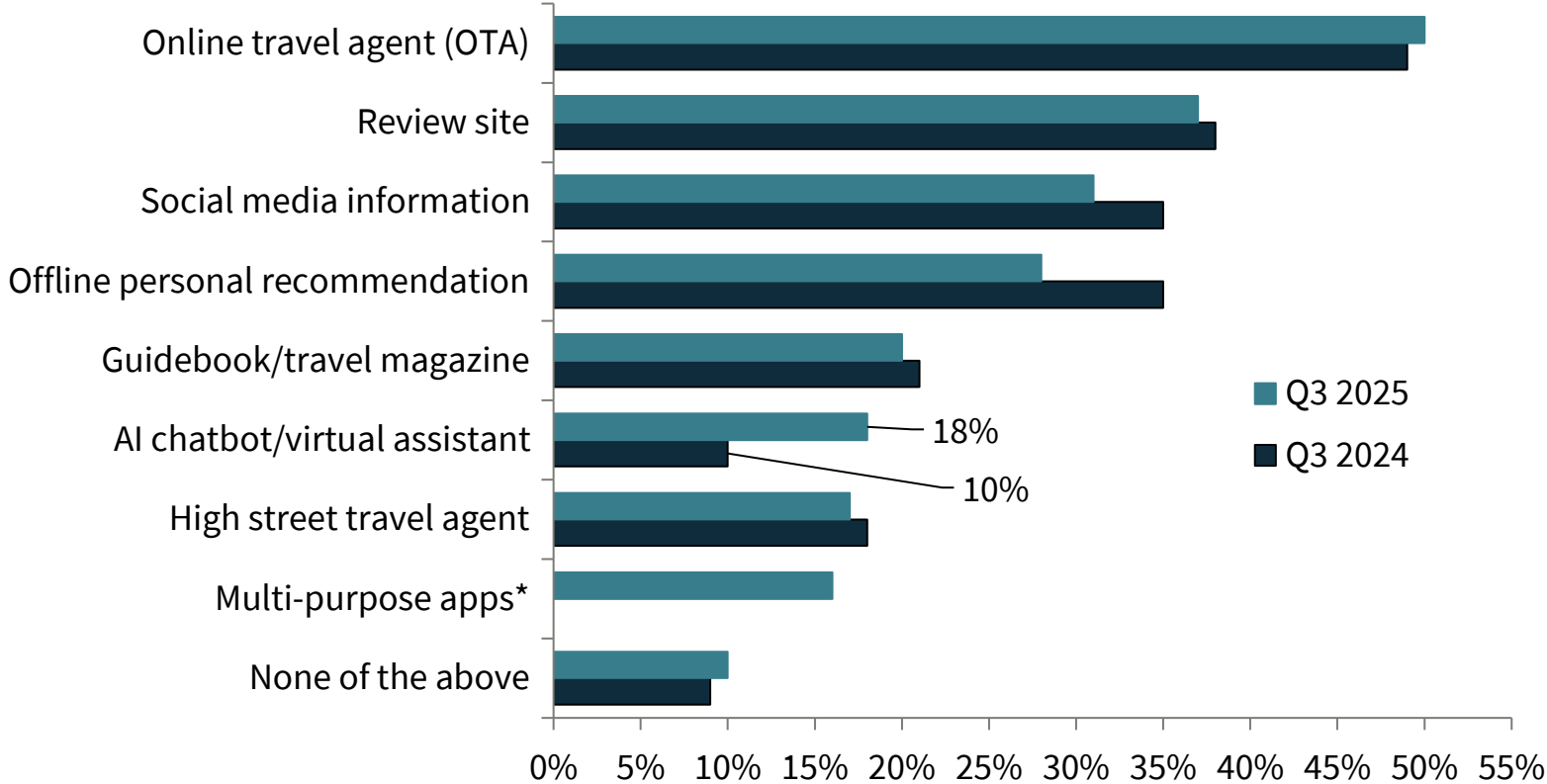


Source: Tourism Economics' Travel Trends Survey/Vitreous World

# Consumers are increasingly utilising technology to plan and research trips, but this varies across generations

## Tools that were used in planning/researching previous international trip

% of respondents using each tool



### Aggregate use of online tools:

- Gen Z & Millennial (88%)
- Gen X & Boomer (65%)

### Aggregate use of AI & social media:

- Gen Z & Millennial (57%)
- Gen X & Boomer (20%)

Source: Tourism Economics' Travel Trends Survey/Vitreous World \*new option in the 2025 survey

# Inbound travel to Europe continues to rise in 2025

	Inbound*				
	2022	2023	2024	2025	2026
data/estimate/forecast***	d	d	d/e	e	f
<b>World</b>	<b>100.5%</b>	<b>36.9%</b>	<b>13.1%</b>	<b>5.6%</b>	<b>8.5%</b>
<b>Americas</b>	<b>89.2%</b>	<b>27.1%</b>	<b>7.9%</b>	<b>2.4%</b>	<b>5.6%</b>
North America	78.2%	24.3%	8.4%	-0.7%	4.3%
Caribbean	51.3%	17.9%	4.9%	2.4%	7.3%
Central & South America	209.7%	43.4%	8.0%	11.0%	7.9%
<b>Europe</b>	<b>92.0%</b>	<b>18.7%</b>	<b>7.8%</b>	<b>5.3%</b>	<b>6.8%</b>
ETC+2	100.9%	18.0%	6.7%	4.2%	6.2%
EU 27	106.8%	18.5%	6.2%	4.5%	5.7%
Non-EU	45.0%	19.3%	14.9%	8.6%	10.8%
Northern	203.0%	18.0%	7.5%	3.4%	4.7%
Western	93.7%	22.0%	3.8%	1.4%	4.4%
Southern/Mediterranean	90.0%	16.4%	7.8%	4.6%	5.9%
Central/Eastern	41.2%	19.2%	13.4%	16.8%	15.2%
- Central & Baltic	92.3%	16.5%	8.1%	9.0%	10.8%

\* Inbound is based on the sum of the country overnight tourist arrivals and includes intra-regional flows

\*\*\*data is the final historical numbers available. Estimates are using high frequency indicators

Source: Tourism Economics based on GTS as of 13.10.2025

Inbound arrivals to Europe to rise by **5.3% in 2025**

Uncertain economic conditions and elevated prices means **consumers remain price sensitive**

Slower-than-expected return in visitors from **Asia/Pacific – recovery now expected in 2027**

Central/Eastern Europe leads in year-on-year growth as **many destinations remain in the post-pandemic catch-up phase**

Opportunities include continued improvements in **connectivity** and expanding **tourism demand outside of peak months**



**Thank you for listening**

